



Anaplan Connector for Mulesoft Configuration Guide

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1 Anaplan Connector for MuleSoft

The Anaplan Connector for Mulesoft allows you to create solutions that can extract, transform, and load (ETL) data from a source system into Anaplan. MuleSoft, Inc. provides an Eclipse-based graphical environment, Anypoint Studio, for designing and configuring integration solutions with Mulesoft's library of more than one hundred Connectors to other applications, such as Workday, Salesforce.com, and SAP.

The Anaplan Connector for Mulesoft can be used for import, export, and delete actions in an orchestration of services that Mulesoft calls a Flow.

For example, the Flow you build might:

- Import data into Anaplan from a database, Salesforce.com, or a CSV file
- Export a recently updated Module from Anaplan into a CSV file, or import into a target, such as a database or Salesforce.com
- Perform data transformations on a schedule
- Delete obsolete data
- Perform a model-to-model import

You configure the Anaplan Connector with credentials to connect to a data source and perform operations. With the Anaplan Connector for Mulesoft, you build Anypoint flows that work with:

- Anaplan Lists
- Anaplan Modules
- Anaplan User Access

Note: Anaplan Connect is a command-line tool for Import, Export, Delete, and Processes (combinations of Imports, Exports, and/or Deletes) that uses batch files and allows automated scheduling on the operating system scheduling tool. The Anaplan Connector is an alternative to Anaplan Connect, except that for Processes, the Anaplan Connector for Mulesoft is limited to model-to-model Import actions and Delete actions.

1.1 Mulesoft Prerequisites

- Familiarity with the Mulesoft Anypoint platform.
- An installation of Mulesoft's Anypoint Studio, which is the development environment for building an integration solution with the Anaplan Connector for MuleSoft. Anypoint Studio is available for download at <http://www.mulesoft.com/platform/mule-studio>.

1.2 Anaplan Prerequisites for the Demos

We provide Mulesoft demo projects for import, export, and delete. These demo projects can be a starting point for your Mulesoft projects.

1. You know about the Anaplan actions – import, export, process, and delete – which are explained at <https://community.anaplan.com/anapedia/around-the-platform/settings-tab/actions>.
2. You have verified that your Anaplan model already has the actions that your Mule Flow will automate.

Note: The Anaplan model you are working with does not assume that the data is coming from a particular integration. For example, some Anaplan models have an internal integration with [Salesforce.com](https://www.salesforce.com) and therefore will not work with the Mulesoft integration if Salesforce is used as a source.

3. You know the values for the [Variables for Authentication and Configuration](#) for the demo you want to use. Each demo contains a configuration file named `mule-app.properties`.

EXPORT DEMO MULE-APP.PROPERTIES FILE

```
anaplan.username=  
anaplan.password=  
anaplan.certificatePath=  
anaplan.apiUrl=https://api.anaplan.com  
anaplan.workspaceId=  
anaplan.modelId=  
anaplan.exportId=
```

IMPORT DEMO MULE-APP.PROPERTIES FILE

```
anaplan.username=  
anaplan.password=  
anaplan.certificatePath=  
anaplan.apiUrl=https://api.anaplan.com  
anaplan.workspaceId=  
anaplan.modelId=  
anaplan.importId=  
anaplan.columnSeparator=,  
anaplan.delimiter="  
file.readFromDir=  
file.moveToDir=
```

Note: For a tab-separated file, use `anaplan.columnSeparator=\\t`

DELETE DEMO MULE-APP.PROPERTIES FILE

```
anaplan.username=  
anaplan.password=  
anaplan.certificatePath=  
anaplan.apiUrl=https://api.anaplan.com  
anaplan.workspaceId=  
anaplan.modelId=  
anaplan.deleteActionId=
```

2 Setting up the Environment

1. Install [Java 7](#).
2. Install [Apache Maven](#).
3. Download [Anypoint Studio](#) and install it.
4. Configure Maven:
 - a. Click Anypoint Studio > Preferences > Anypoint Studio > Maven Settings.
 - b. Click Browse to locate the folder where you installed Maven.
 - c. Click Test Maven Configuration and when you see the green checkmark, click OK.
5. Install the Anypoint DevKit Plugin:
 - a. From the Anypoint Studio Help menu, click Install New Software.
 - b. Click Work with > Anypoint Addons Update Site > Anypoint Devkit Plugin.
 - c. Click Next, then click Finish, and restart Studio.

3 Installing the Anaplan Connector

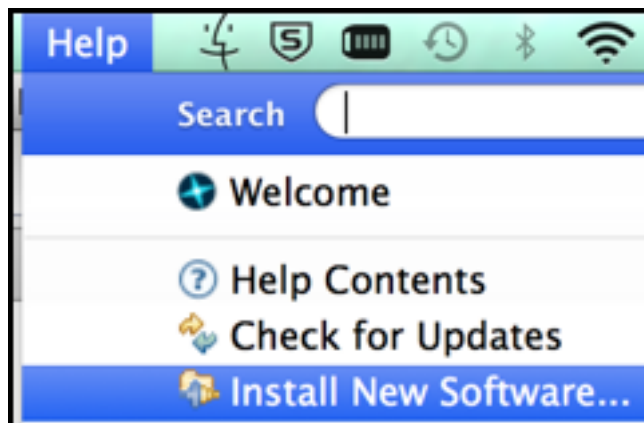
Install the **Anaplan connector**, which is documented at the Mulesoft Anypoint Exchange - <https://www.mulesoft.com/exchange#!/anaplan-integration-connector> and can be installed in either of two ways.

Note: Your version of Anypoint Studio might be slightly different than what is described below.

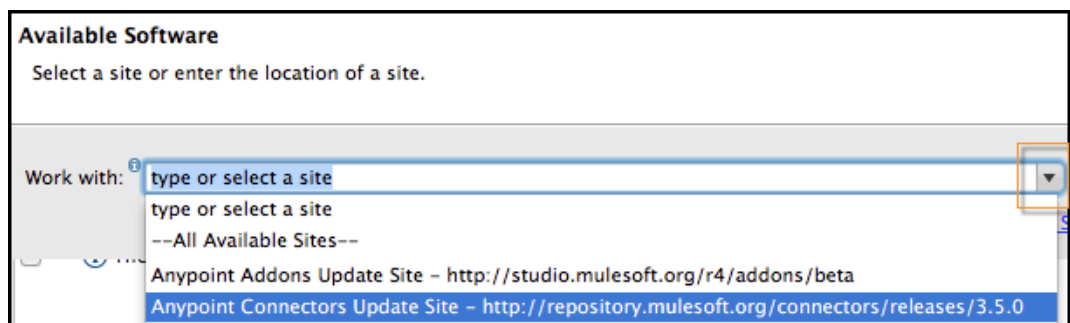
3.1 Option 1: From Anypoint Studio

This is recommended for most users.

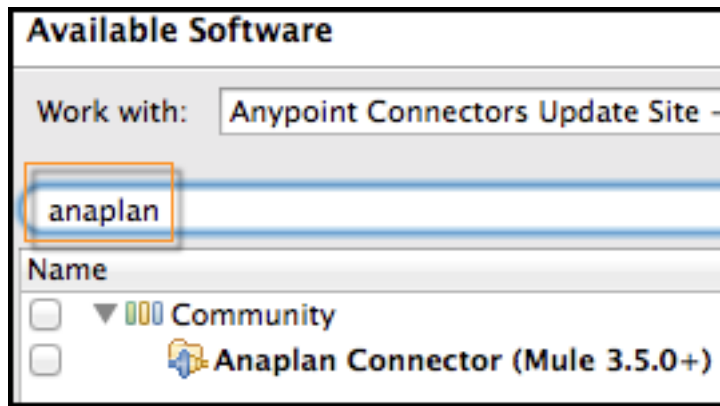
1. Go to **Help > Install New Software**.



2. On the **Work with** list click **Anypoint Connectors Update Site**.

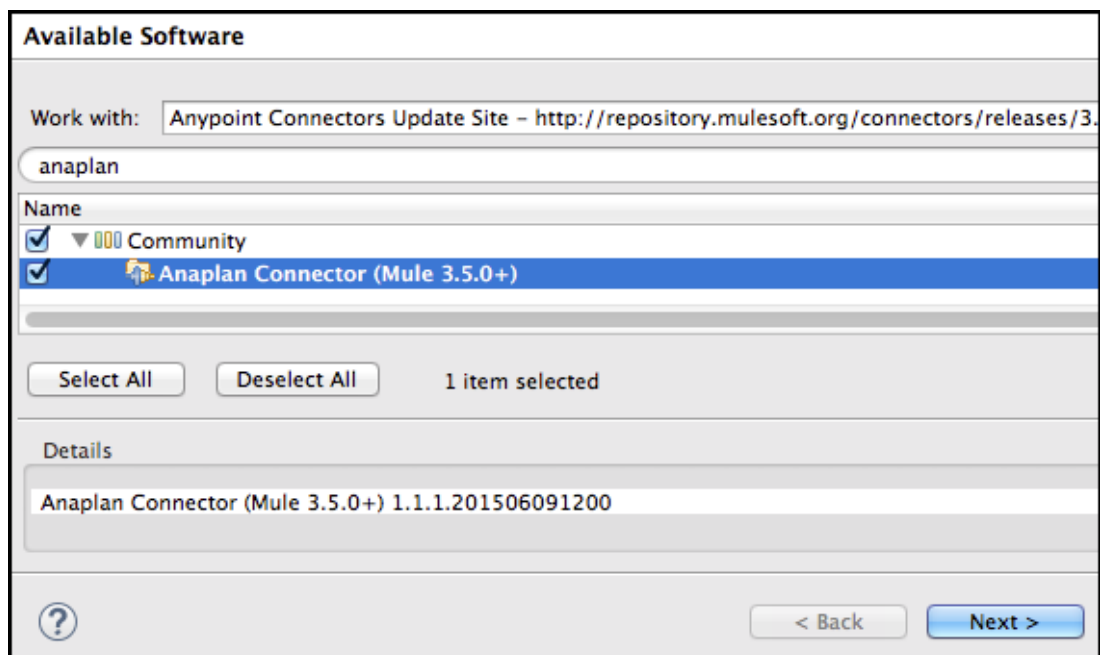


3. In the search box, type *anaplan*.

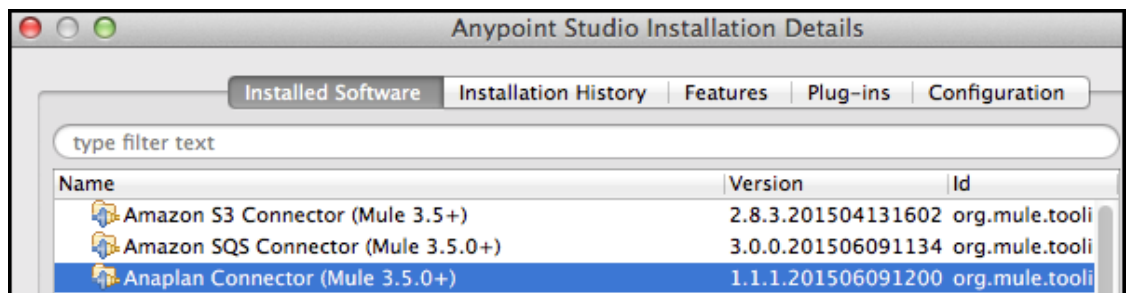


Note that **Anaplan Connector** appears under **Community**.

4. Select the **Anaplan Connector** checkbox, and click **Next**.



5. Follow the instructions as the wizard installs the connector.
6. Click the **Installation Details** button.
7. Verify that **Anaplan Connector (Mule 3.5.0+)** appears as installed software.



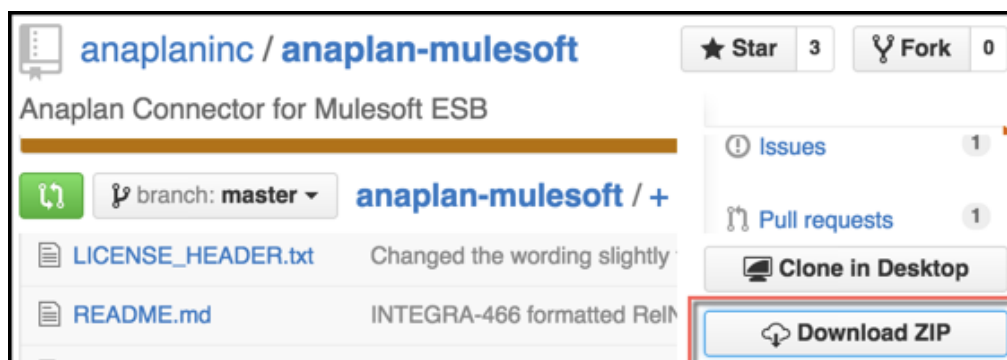
8. To verify the installation, on the **Anypoint Studio** menu, open the **About Anypoint Studio** dialog:



3.2 Option 2: From GitHub

Note: This option is for advanced users only.

1. Go to <https://github.com/anaplaninc/anaplan-mulesoft> and get the downloadable zip named *anaplan-mulesoft-master.zip*.

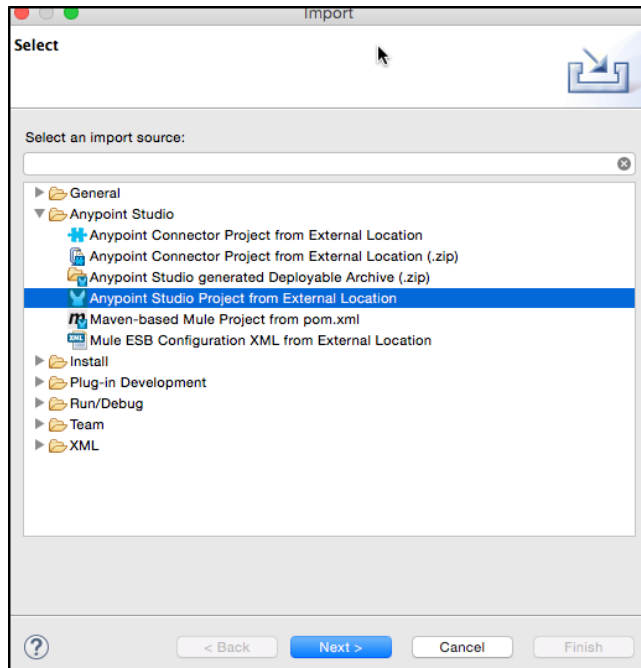


2. In Anypoint Studio, click **File > Import**.
3. In the **Import** dialog, select **Anypoint Studio > Anypoint Connector Project from External Location**.
4. Click **Next**, click **Browse**, and open the project where you unzipped it.
Note that **anaplan-connector** appears in the **Package Explorer** pane.
5. Right-click the project, **Anypoint Connector > Install or Update**.
6. Follow the wizard to install the connector, ignore the warning about "unsigned content", and restart Anypoint Studio when prompted.

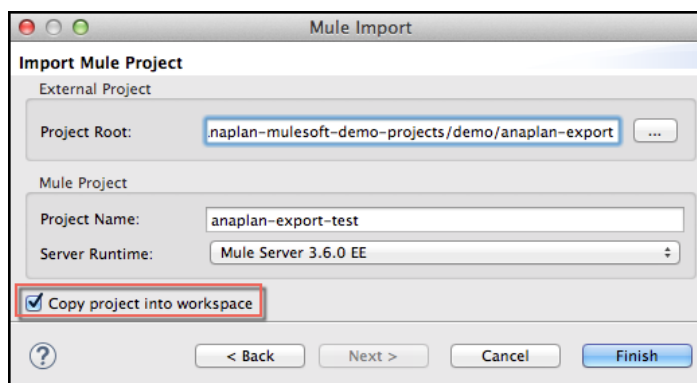
4 Installing the Demo Flows

The Demo flows are inside the *Demo* folder that is part of the downloadable zip described above in *Option 2: From GitHub*.

1. In Anypoint Studio, on the **File** menu, click **Import**, and select **Anypoint Studio Project from External Location**.



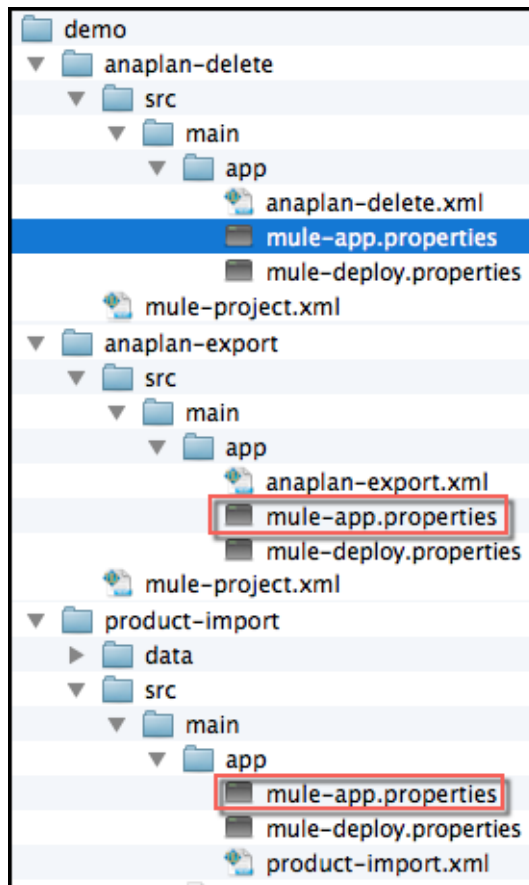
2. In the **Import** dialog, navigate to the project root of one of the demo projects, such as *anaplan-export*, and make sure that **Copy project into workspace** is selected.



You can now install another demo project. There are three demo projects: delete, export, and import.

5 Variables for Authentication and Configuration

1. In your browser, navigate to <https://github.com/anaplaninc/anaplan-mulesoft> and download the zip.
2. Extract the zip file, and notice that it contains a subdirectory named *demo* that contains the demos for delete, export, and import.



3. In Anypoint Studio, click **File > Open**, and navigate to the **mule-app.properties** file for each of the demos:
 - demo/anaplan-delete/src/main/app/mule-app.properties/mule-app.properties
 - demo/anaplan-export/src/main/app/mule-app.properties/mule-app.properties
 - demo/anaplan-import/src/main/app/mule-app.properties/mule-app.properties
4. Provide values for the variables in the mule-app.properties file you want to configure:
 - [anaplan.user=joe.doe@company.com](#) for example
 - anaplan.password=your-password
 - anaplan.certificatePath=/path/to/certificate

- `anaplan.apiUrl=https://api.anaplan.com`
- `anaplan.workspaceId=identifier-for-your-workspace`
- `anaplan.modelId=identifier-for-your-model`
- `anaplan.importId=identifier-for-your-import-action`
- `anaplan.columnSeparator=,`
- or, for a tab-separated file, use `anaplan.columnSeparator=\\t`
- `anaplan.delimiter="`
- or `anaplan.delimiter='`
- or `anaplan.delimiter=|`

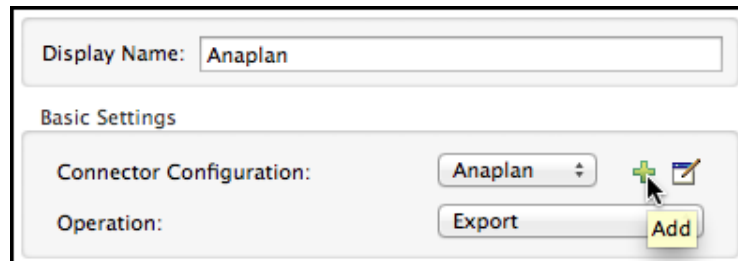
5. Click **File > Save**.

You're now ready for [Configuring Authentication - Basic or Certificate](#).

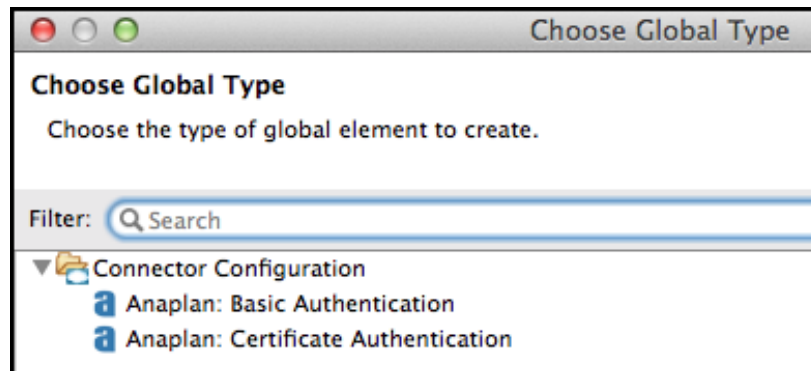
6 Configuring Authentication - Basic or Certificate

To set up authentication for an Export, Import, Execution action (for a Delete action), or a Process, perform the following steps.

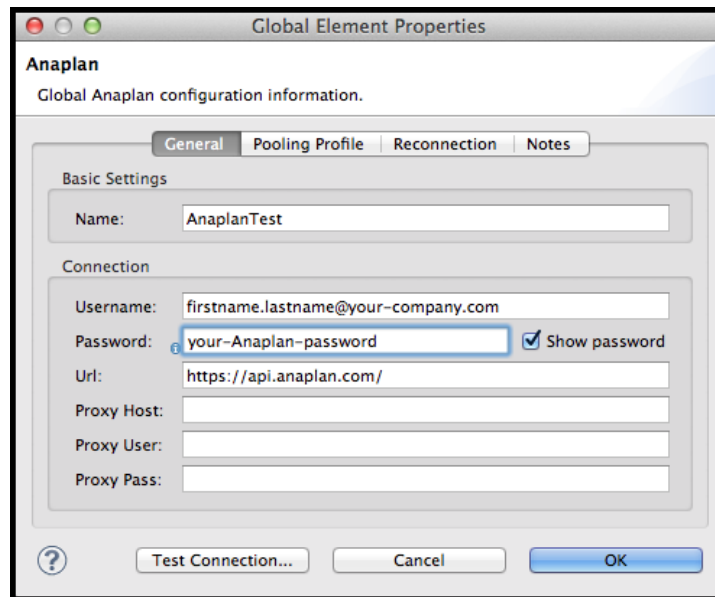
1. Click .



2. In the **Choose Global Type** dialog, click either **Basic Authentication** (username, password) or **Certificate Authentication**.



- If you clicked **Basic Authentication**, populate the **Username** and **Password** fields, click **Test Connection** to verify that the credentials work, then click **OK**.



Global Element Properties

Anaplan
Global Anaplan configuration information.

General | Pooling Profile | Reconnection | Notes

Basic Settings

Name: AnaplanTest

Connection

Username: firstname.lastname@your-company.com

Password: your-Anaplan-password ☒ Show password

Url: https://api.anaplan.com/

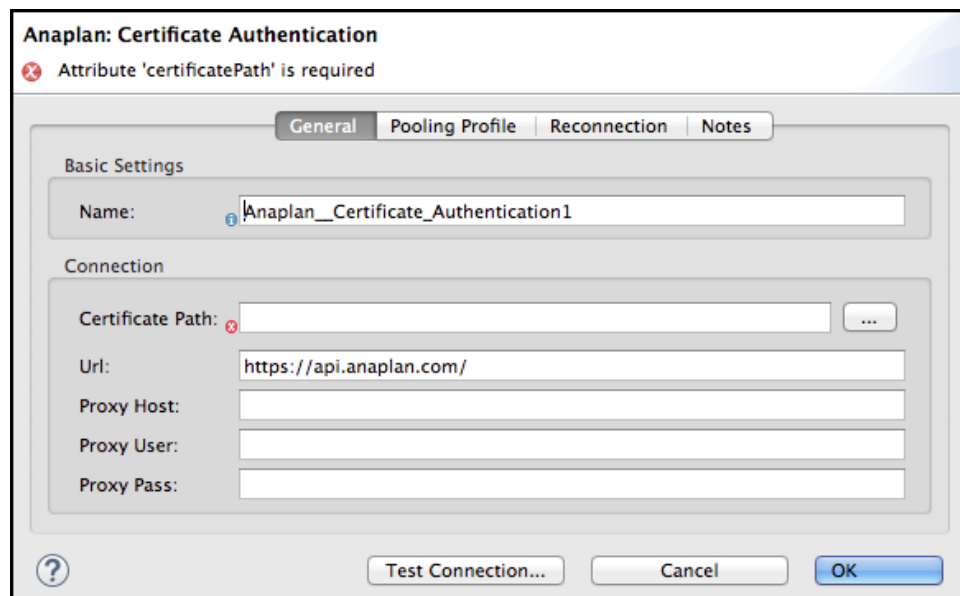
Proxy Host:

Proxy User:

Proxy Pass:

? Test Connection... Cancel OK

- If you clicked **Certificate Authentication**, in the **Certificate Path** field, click the "..." button to navigate to the certificate, then click **Test Connection** to verify that the credentials work, then click **OK**.



Anaplan: Certificate Authentication

Attribute 'certificatePath' is required

General | Pooling Profile | Reconnection | Notes

Basic Settings

Name: Anaplan__Certificate_Authentication1

Connection

Certificate Path: ...

Url: https://api.anaplan.com/

Proxy Host:

Proxy User:

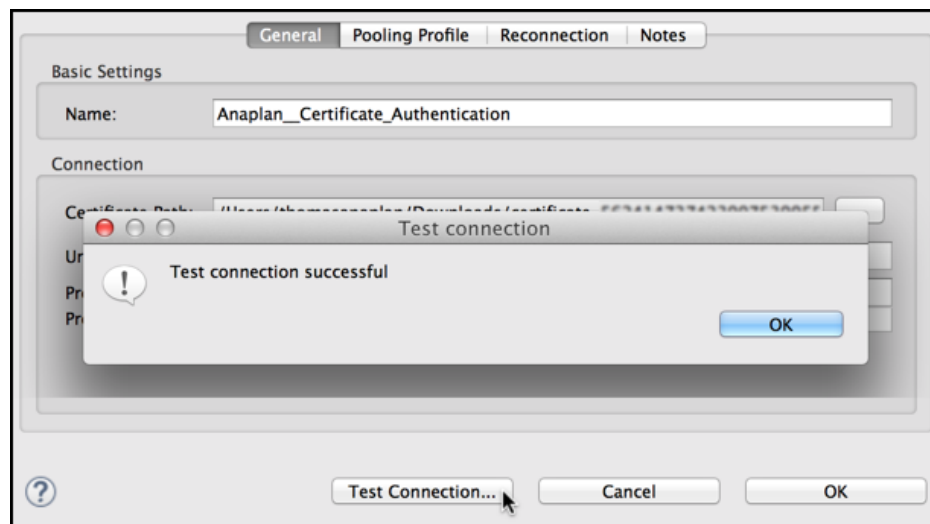
Proxy Pass:

? Test Connection... Cancel OK

7 Testing the Connection to the Anaplan API Server

The variables for Authentication allow the flow to connect to the Anaplan API Server.

1. To test this, from Anypoint Studio, in the Demo flow, double-click the Anaplan connector and then edit the configuration.
2. In the Global Element Properties dialog, click **Test Connection** and verify that the Test connection successful message is displayed. Click **OK**.

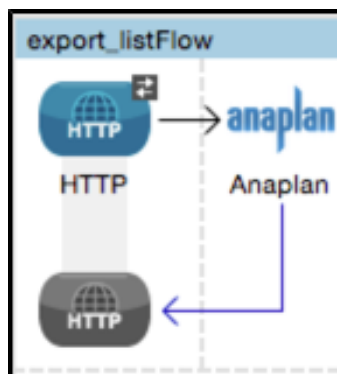


8 Export

You can run the Demo flow, or create your own Flow that exports a List, Module, or a set of Users, from Anaplan into another data-source, such as a CSV file or Salesforce.com.

Let's start with a simple example.

1. In Anypoint Studio, on the **File** menu, click **New > Mule Project**.
2. Enter the project name and check "Use Maven" if you want to Apache Maven to build this flow project. Click **Finish**.
3. In the **Message Flow** tab, build your flow by dropping Connectors into the Anypoint Studio Flow area as shown below:



In this example, we configured the HTTP connector to listen on *localhost:8081* to initiate the Anaplan export. The output from the connector is piped back to the HTTP connector to build a HTTP response so that we can view the results.

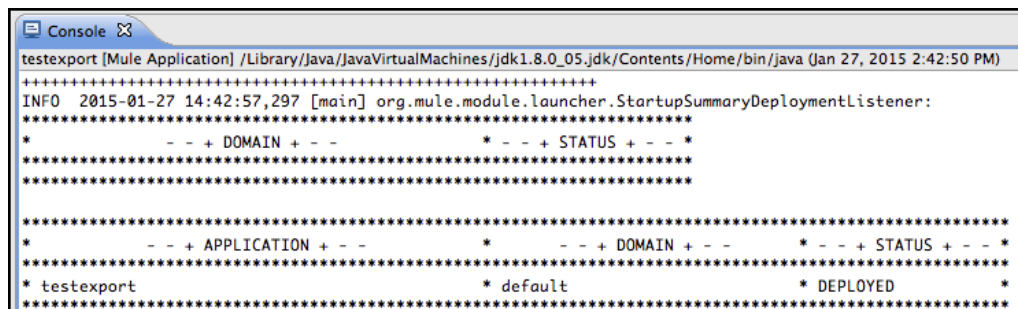
4. To configure the Anaplan connector, double-click the **Anaplan** connector icon on the flow, which will bring up a configuration panel:

The screenshot shows the configuration panel for the Anaplan connector. It has three main sections: 'Display Name' (set to 'Anaplan'), 'Basic Settings', and 'General'. In the 'Basic Settings' section, 'Connector Configuration' is set to 'Anaplan__Basic_Authentication' and 'Operation' is set to 'Export'. In the 'General' section, 'Export name or ID' is 'QACorp Exp Spread Profiles - 445.csv', 'Model name or ID' is 'Budgeting, Planning and Forecasting', and 'Workspace name or ID' is 'Anaplan'.

5. Click  next to the **Connector Configuration** box to set up the Anaplan authentication configuration.

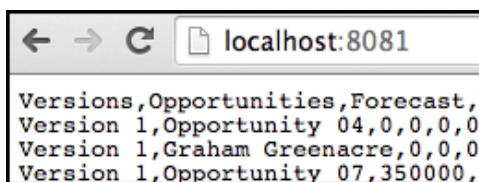
Note: For details on setting up a Username/Password based authentication or a Certificate based authentication, see [Configuring Authentication - Basic or Certificate](#).

6. Save your Flow (**cmd+s** on Mac, or **ctrl+s** on Windows).
7. Make sure your Flow tab is active.
8. On the **Run** menu, click **Run As > Mule Application**.
9. Verify that the console indicates the Flow is deployed.



```
testexport [Mule Application] /Library/Java/JavaVirtualMachines/jdk1.8.0_05.jdk/Contents/Home/bin/java (Jan 27, 2015 2:42:50 PM)
+++++
INFO 2015-01-27 14:42:57,297 [main] org.mule.module.launcher.StartupSummaryDeploymentListener:
*****
*      - - + DOMAIN + - -      * - - + STATUS + - - *
*****
*****
*      - - + APPLICATION + - -      * - - + DOMAIN + - -      * - - + STATUS + - - *
*****
* testexport                      * default                      * DEPLOYED                      *
*****
```

10. Execute the Flow by opening a browser to <http://localhost:8081>.
11. Verify that the output of the Export displays on the HTML page.



```
← → ↻ 📄 localhost:8081
Versions, Opportunities, Forecast,
Version 1, Opportunity 04, 0, 0, 0, 0
Version 1, Graham Greenacre, 0, 0, 0
Version 1, Opportunity 07, 350000, 0
```

12. You're now ready to build a flow that exports to a file, if required.

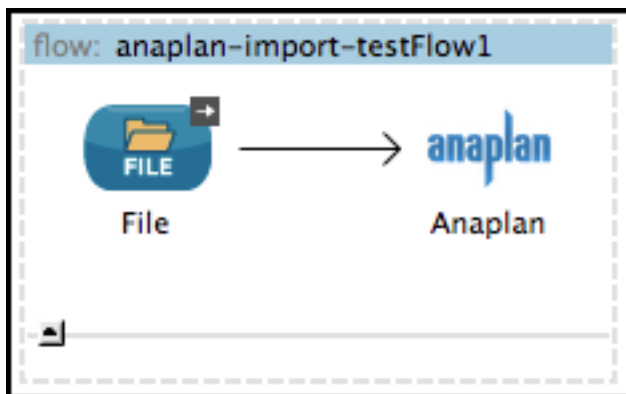
9 Import

You can run the Demo flow, or create your own Flow that imports from another data-source, such as a .csv file or Workday, into Anaplan.

Let's start with a simple example.

1. In Anypoint Studio, on the **File** menu, click **New > Mule Project**, and proceed through the dialogs.
2. On the Anypoint Studio **Message Flow** tab, build your flow by dropping Connectors into the Anypoint Studio Flow area.

This example imports a .csv file from a directory you specify, brings the data into a List in Anaplan, and moves the .csv file to another directory that you specify.



3. Configure the **File** connector with the following:
 - a. **Path** to the directory that holds the .csv file.

IMPORTANT! Make sure the directory contains exactly one (1) import file and no other files, because the Flow will attempt to operate on all files in this original directory.

NOTE TO MACINTOSH USERS: To make sure the Path directory contains exactly one (1) import file, use the command-line Terminal (**Applications > Utilities > Terminal**) to navigate to the directory, then type the **ls -a** command to see all files, including hidden files. If the Path directory contains a .DS_Store file, remove it by typing **rm .DS_Store**. (Do not use the Finder because the Finder adds a "hidden" file named **.DS_Store** to any folder it modifies.)

- b. **Move to Directory** that receives the file after the import completes. This empties the original Path directory.

Display Name:

Basic Settings

Path:

Move to Pattern:

Move to Directory:

Connector Configuration:

4. Set the Anaplan Authentication. See [Configuring Authentication - Basic or Certificate](#).
5. Configure the **Anaplan** connector for the Import **Operation**, and specify the **Import name or ID**, the **Model name or ID**, and the **Workspace name or ID**.

Display Name:

Basic Settings

Connector Configuration:

Operation:

General

Column separator:

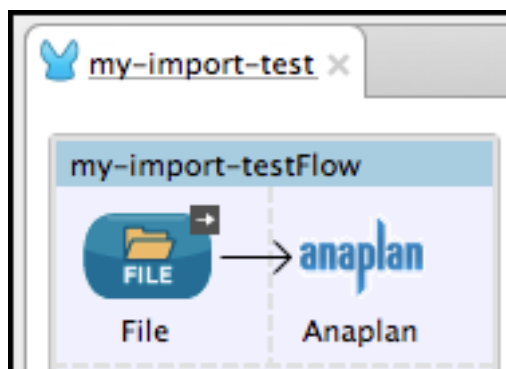
Delimiter:

Import name or ID:

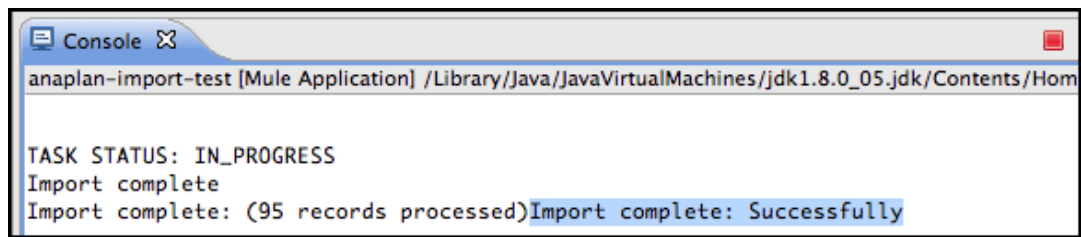
Model name or ID:

Workspace name or ID:

6. Select your Flow, then on the **Run** menu, click **Run As > Mule Application**.

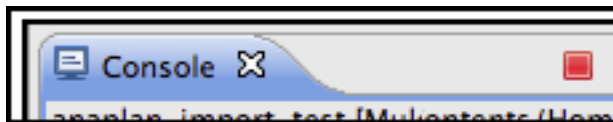


The **Console** indicates the result:



7. To verify the import, look at the model inside Anaplan. For example, if you imported into a list, that list now shows the imported data.

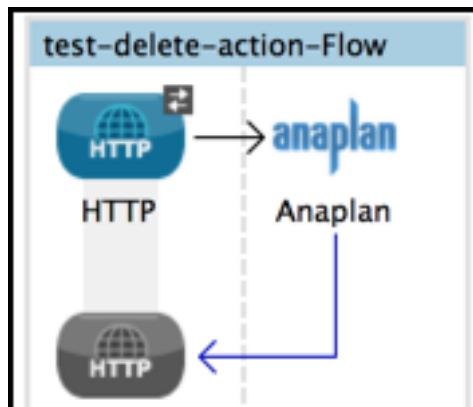
By default, the Flow automatically runs again each time a file appears in the original **Path** directory. If you want to prevent this automatic triggering, go to Anypoint Studio **Console** and click the red square.



10 Delete

You can run the Demo flow, or create your own Flow for a Delete action.

1. In Anypoint Studio, on the **File** menu, click **New > Mule Project**.
2. In the **Message Flow** tab, build your flow by dropping Connectors into the Anypoint Studio Flow area.

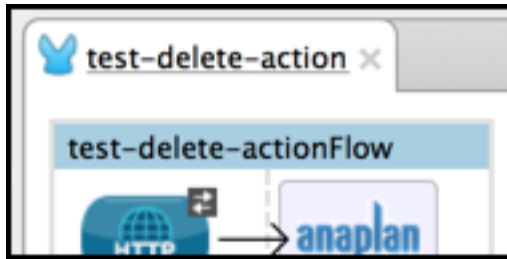


3. Double-click the **Anaplan** connector.
4. Set the Anaplan Authentication. See [Configuring Authentication - Basic or Certificate](#).
5. For **Operation**, choose **Delete**, then supply the name or ID of the action, model, and workspace.

The screenshot shows the configuration dialog for the Anaplan connector. It has three main sections: "Display Name", "Basic Settings", and "General".

- Display Name:** Anaplan
- Basic Settings:**
 - Connector Configuration:** Anaplan__Certificate_Authentication1
 - Operation:** Delete
- General:**
 - Delete action name or ID:** Clear Departments L3
 - Model name or ID:** 582FC803216279401C8200754000C62788
 - Workspace name or ID:** 8281134884150F66330146267304785786

6. Save your Flow.
7. Select your Flow, then on the **Run** menu, click **Run As > Mule Application**.



This puts the Flow in the "deployed" state.

```

+++++
+ Mule is up and kicking (every 5000ms)                                     +
+++++
INFO 2015-02-11 13:19:11,078 [main] org.mule.module.launcher.S
*****
*      - - + DOMAIN + - -                                           * - - + STATUS
*****
* default                                                         * DEPLOYED
*****

*****
*      - - + APPLICATION + - -                                       * - - + [
*****
* my_delete_action                                           * default
*****

```

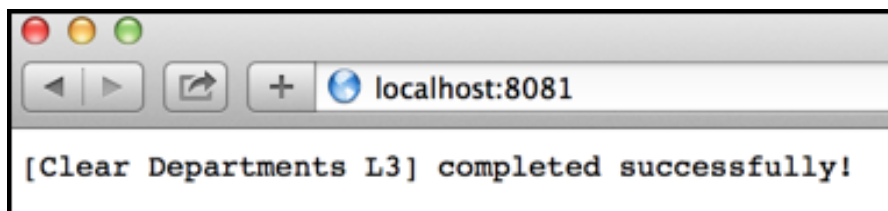
8. To run the Flow, refresh a browser that is set to <http://localhost:8081/>
9. Watch the Flow run in the Anypoint Studio Console.

```

Status: SUCCESS, Response message: COMPLETE
.
s L3] [Clear Departments L3] completed successfully!

```

10. Refresh your browser that is still pointing at <http://localhost:8081> to see the outcome message.



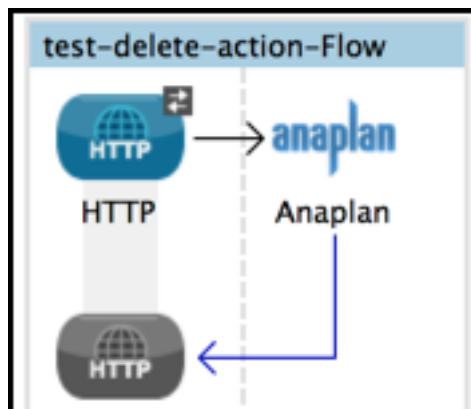
11 Process

A Process is an ordered set of multiple actions in a single container.

Important! The set can contain **model-to-model Import and/or Delete actions**. If you want a process for multiple Import actions that are not model-to-model, or for multiple export actions, use Anaplan Connect.

What follows is a simple example that contains multiple Delete actions.

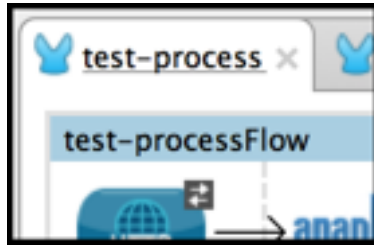
1. In Anypoint Studio, on the **File** menu, click **New > Mule Project**.
2. In the **Message Flow** tab, build your flow by dropping Connectors into the Anypoint Studio Flow area.



3. Double-click the **Anaplan** connector.
4. Set the Anaplan Authentication. In general, we recommend using Certificate Authentication because it is more secure than Basic Authentication. See [Configuring Authentication - Basic or Certificate](#).
5. For **Operation**, choose **Process**, then supply the name or ID of the action, model, and workspace.

Display Name:	Anaplan
Basic Settings	
Connector Configuration:	Anaplan_Certificate_Authentication
Operation:	Process
General	
Model name or ID:	582C802742774403C820F54008C622B8
Process name or ID:	6 Clear Asset Name
Workspace name or ID:	8 813488419A633034626770A7B57B6

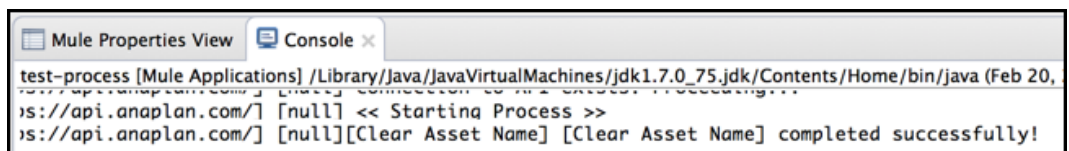
6. Save your Flow.
7. Select your Flow then on the **Run** menu, click **Run As > Mule Application**.



This puts the Flow in the "deployed" state.

```
*****
*      - - + APPLICATION + - - *      - - + DOMAIN + - - *      - - + STATUS + - - *
*****
* test-process                * default                * DEPLOYED                *
*****
```

- To run the Flow, refresh a browser that is set to <http://localhost:8081/>
- Watch the Flow run in the Anypoint Studio Console, which displays the name of the Process within Anaplan.



10. Refresh your browser that is still pointing at <http://localhost:8081> to see the outcome message, which displays the name of the Process within Anaplan.

